

# 2021



Global  
Education  
Alliance  

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We Navigate

# MARKET DIGEST REPORT

Insights, Findings & Opportunities 2022

Conducted in December 2022

## Market Update

We are delighted to bring you the 3rd in our GEA Market Digest reports which seek to summarise the picture we are seeing in market and to offer insight which can lead to actions that capitalizes on opportunity or mitigate risk.

What began in April 2020 as a summary of counsellor sentiment re COVID-19, continued in July. The overwhelming sentiment was best summarised as 'a changing and uncertain picture requires clear and regular communication and proactive commitment....and those are not uniformly in place across the sector'.

Crucially, the 'Digest' and the conversations it prompted, led many of our partners, particularly in the UK and in Australia to take action. These demonstrably improved student satisfaction, conversion and retention. Whether by engaging us in communicating with applicants or students, by hosting subject-specific campaigns or by hosting students on shared campus 'Learning Villages' institutions who did things differently saw positive results.

This Digest was compiled in December before the true onset of the Omicron variant. It contains our largest ever survey with responses from more than 860 counsellors across mainland China and 120 in Taiwan and Hong Kong. They offer a snapshot on how portfolios performed in 2021 and what counsellors on the front line expect to see in 2022. While it may not capture an 'up-to-the-minute' view on the development of Omicron, the dynamic nature of the pandemic means this was not the intent. Importantly, as we look to 2022 and beyond, we see COVID as by no means the only factor at play.

The 'Double-Reduction' policy in China has shaken the domestic education picture more than any legislative change in the past twenty years with tutoring and the teaching of international curriculum prohibited. Additionally, international schools in China which have grown exponentially in recent years will now have to offer the Chinese curriculum in addition to A levels or IB when they are teaching Chinese nationals. The policy in general will impact the access students have to both English and international programmes which will in turn affect how and when (and if) they decide to study overseas.



Additionally, even if 2022 is to be the year we emerge from COVID, there is much talk about how the rise of universities in Asia will impact students' ambitions to study in the UK, Australia, New Zealand and the US. Examples from the World Economic Forum and the South China Morning Post show topics regularly discussed on social media.

## Asian universities are on the rise. This is what it means for the rest of the world

### THE ASIA UNIVERSITY RANKINGS 2021 - TOP 10

| Rank 2021 | Rank 2020 | Position in World University Rankings 2021 | Institution                      | Country/region |
|-----------|-----------|--------------------------------------------|----------------------------------|----------------|
| 1         | 1         | =20                                        | Tsinghua University              | China          |
| 2         | 2         | 23                                         | Peking University                | China          |
| 3         | 3         | 25                                         | National University of Singapore | Singapore      |

## Chinese graduates lament Western degrees no longer a fast track for top jobs

- As Chinese universities climb up world rankings, Western degrees are not as prized by employers as they once were, according to overseas graduates
- Hiring departments are often more familiar with elite Chinese universities and certain professions require strong local networks, young jobseekers say

In looking to 2022 we also reflect on 2021. While partnering with institutions for growth it was vital to deliver on our core mission – to bring our network together and to give back. We did this via the largest sectoral gathering of its kind – our face to face and virtual conference in Dalian in November. Also, our annual 'Ride for the Children' saw 50 riders pedal 150 km over 3 days raising thousands for children in rural schools.

It was also a year of significant investment, for example in the opening of our new office in Kuala Lumpur to service our South East Asia expansion and a second office in Hong Kong where a larger space reflects our growth and ability to host events. We have also expanded the datahubs we operate allowing us to improve the efficiency and accuracy of our admissions processes in terms of pre-screening, compliance checks and conversion. This allow us to provide unrivalled data analysis which we'll be sharing with partners at regular intervals. The datahubs will additionally help to further improve our 'My School Offer' student-institution matching platform which many of you are already benefiting from. To find out more about how you can become a close part of any of these developments, please just let us know.

As with the earlier editions, this digest does not seek to provide an academic level quantitative analysis. It simply reflects the information and insights we use daily to do our jobs and which we share in the spirit of partnership. That partnership spirit is fundamental to how we serve you. We are grateful each day for the support we receive and friendships we make in doing so.

Whatever happens in 2022 we look forward to more and deeper engagement and to seeing as many of you as possible in person whenever we can!

We Navigate!

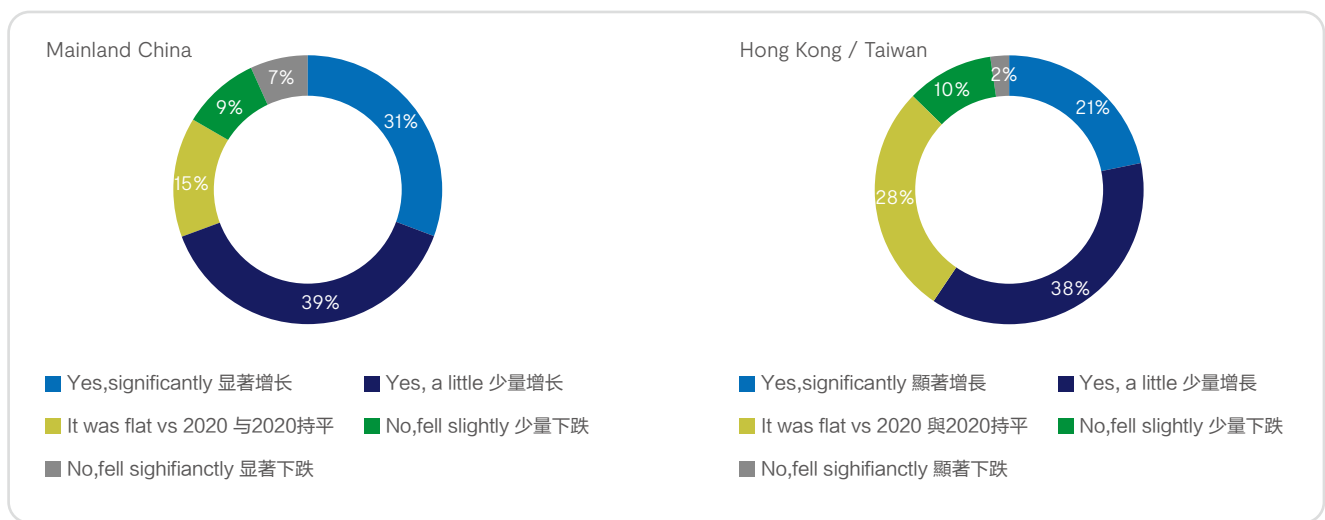
# Section 1

## Growth 增长情况

Here we wanted to look at how the main markets grew relative to each other within our network. For Australia this was forward looking to Q1 2022 vs Q1 2021 and allowed counsellors to factor the initial border re-opening announcement (pre the 2-week delay). For the UK and US, counsellors were considering Q3/4 2021 vs 2020. Note that we suggest counsellors have interpreted 'significant' growth and 'very confident' to mean double-digit+ growth with a scale moving down from there.

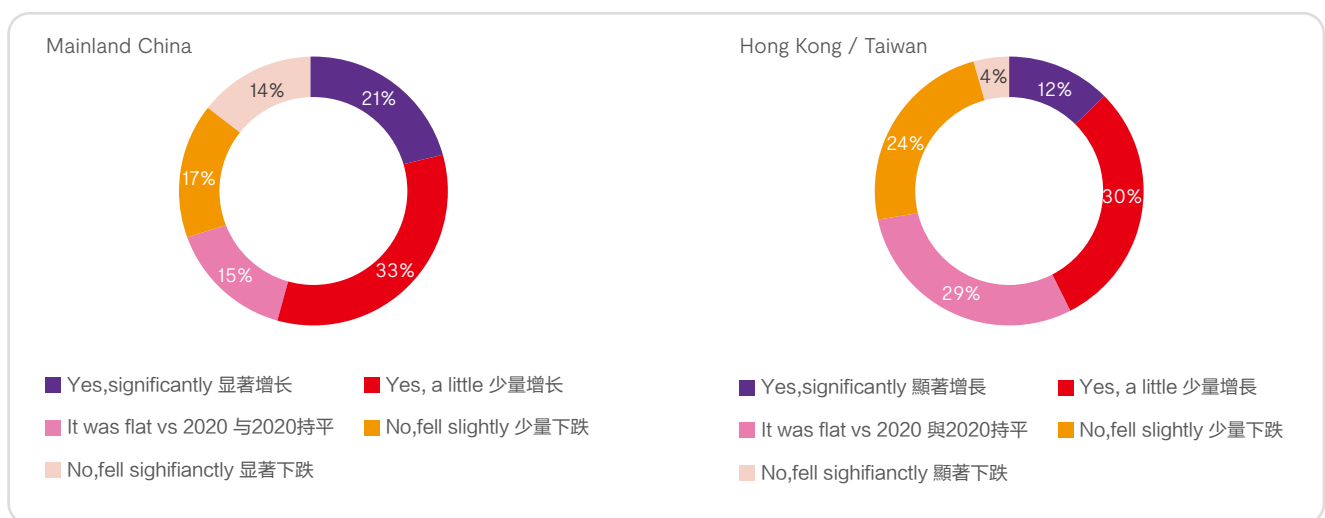
### 第1题 Did your main UK intake in 2021 grow compared to 2020?

同比2020年，您2021年英国的入学量增长了吗？

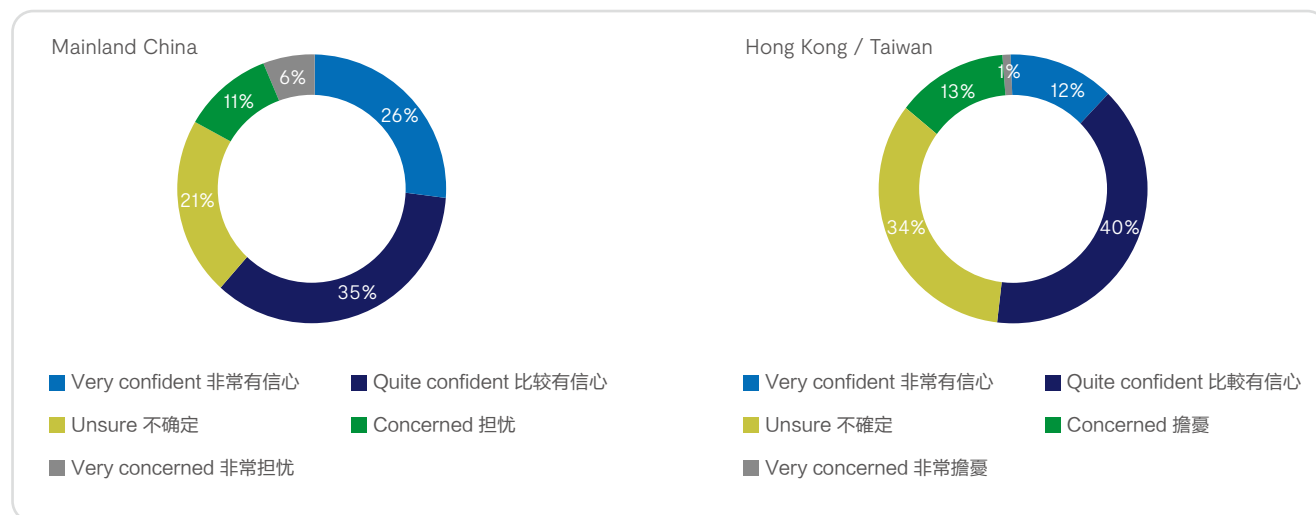


### 第2题 Did your main US intake in 2021 grow compared to 2020?

同比2020年，您2021年美国的入学量增长了吗？

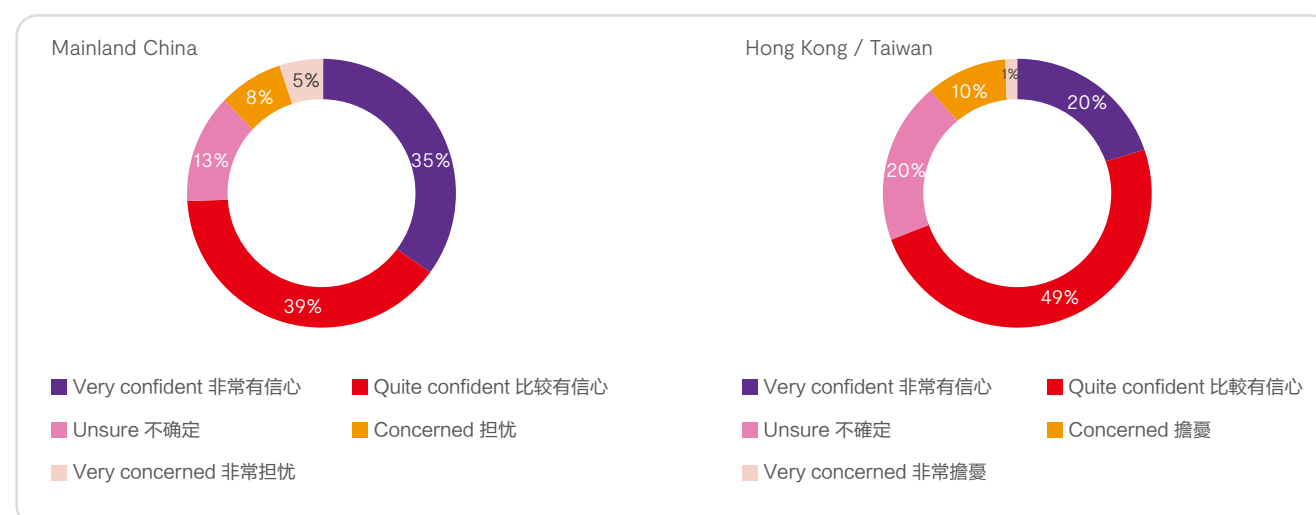


**第3题 How confident are you that the main AU intake (Spring 2022) will increase compared to 2021?**  
**对比2021年，您对澳洲2022年春季入学量增长持有多大的信心？**

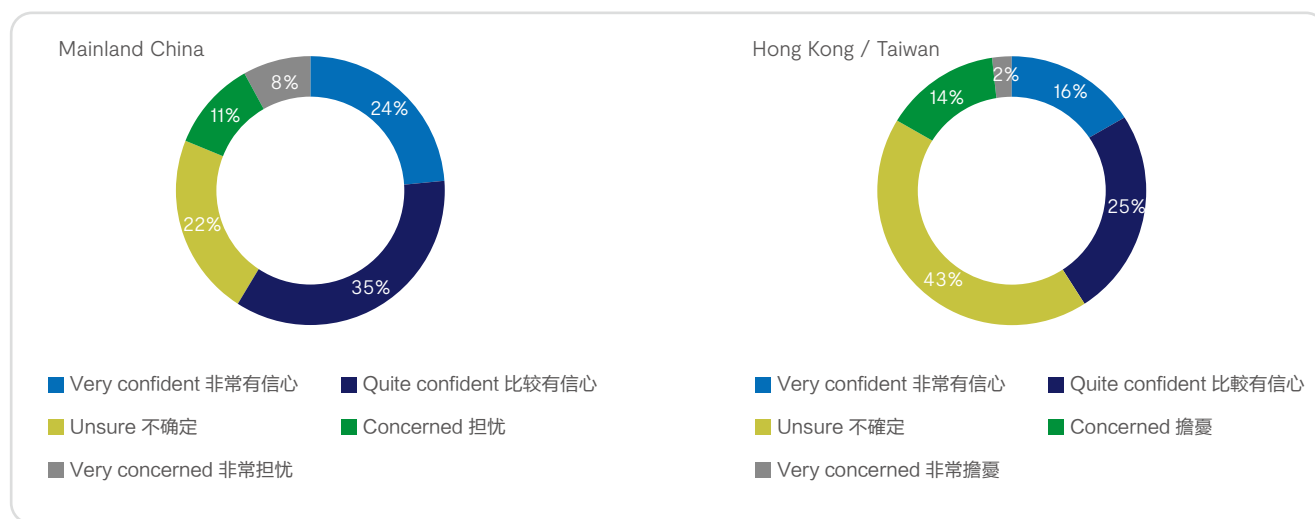


In general, the UK seems to have fared better than the US or Australia for actual intakes though there is optimism re Australia for Q1 2022. The picture in mainland China was stronger than that in Hong Kong and Taiwan. Students and families were (even) more conservative in TW and HK re waiting for greater confidence on the safety picture.

**第4题 How confident are you that the main UK intake in 2022 will increase compared to 2021?**  
**对比2021年，您对英国2022年入学量增长持有多大的信心？**



**第5题 How confident are you that the main US intake in 2022 will increase compared to 2021?**  
**对比2021年，您对美国2022年入学量增长持有多大的信心？**



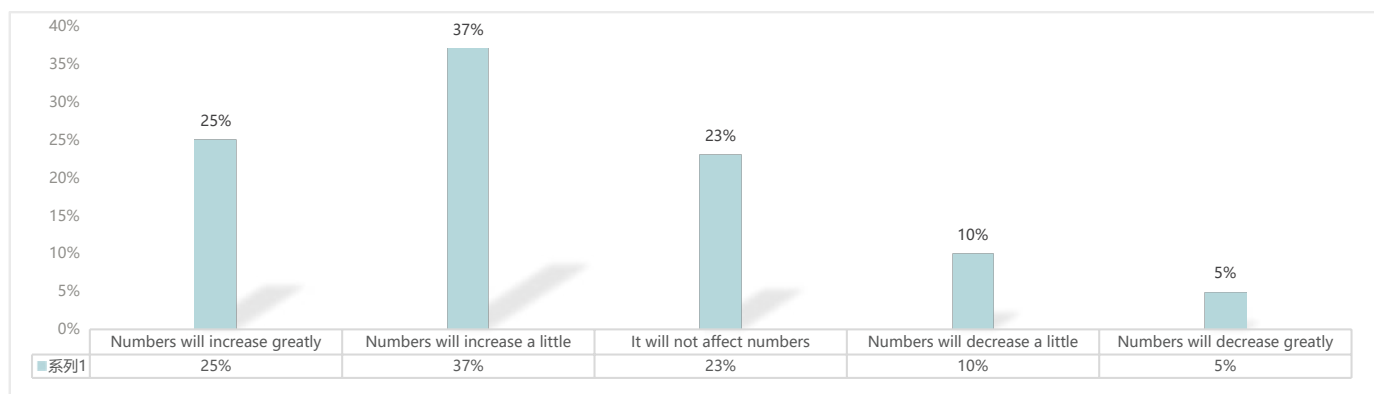
In looking at 2022 there is an expectation that the re-bounce will continue. 2021 grew on 2020 but for most has not yet reached 2019 levels. The relative positivity is stronger when take 'very' and 'quite' confident together. The fact that mainland China confidence outstrips that in Hong Kong and Taiwan may be down to the perceptions of safety but equally could reflect that other, additional factors will apply in China.

## Section 2

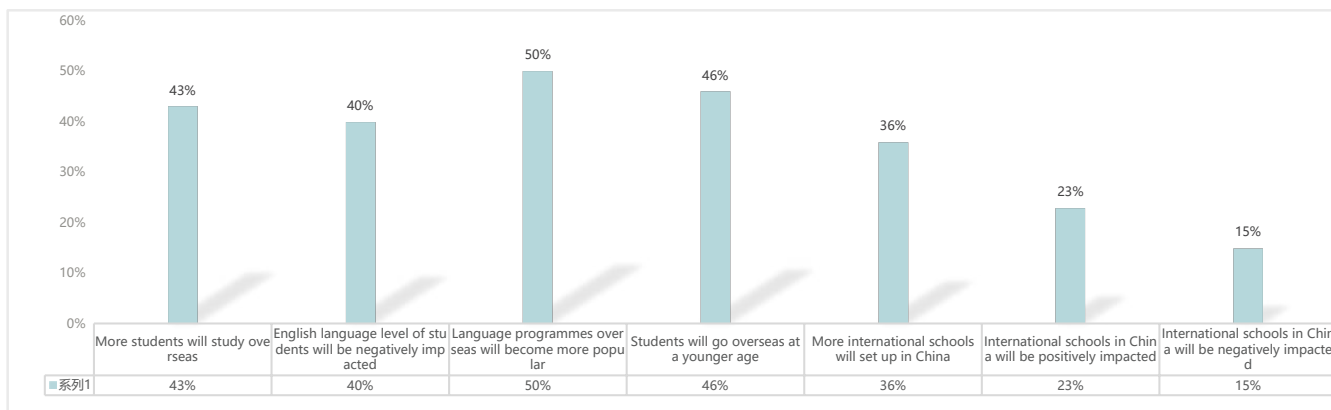
### Impact of Double Reduction 双减政策的影响 (mainland China only)

This section looks at how changes in the domestic education policy will impact international study in terms of numbers and where the impact may be felt. We have not stipulated a time frame for the impact in order to simplify the responses. A full explanation of the policy itself is available on request and details are widely available online

**第6题 What impact will the Double Reduction policy have on overseas study, in terms of numbers?**  
**“双减”政策对留学人数有何影响？**



**第7题 In which of the following ways will the market be impacted by the Double Reduction policy?**  
“双减”政策会以何种方式影响市场?



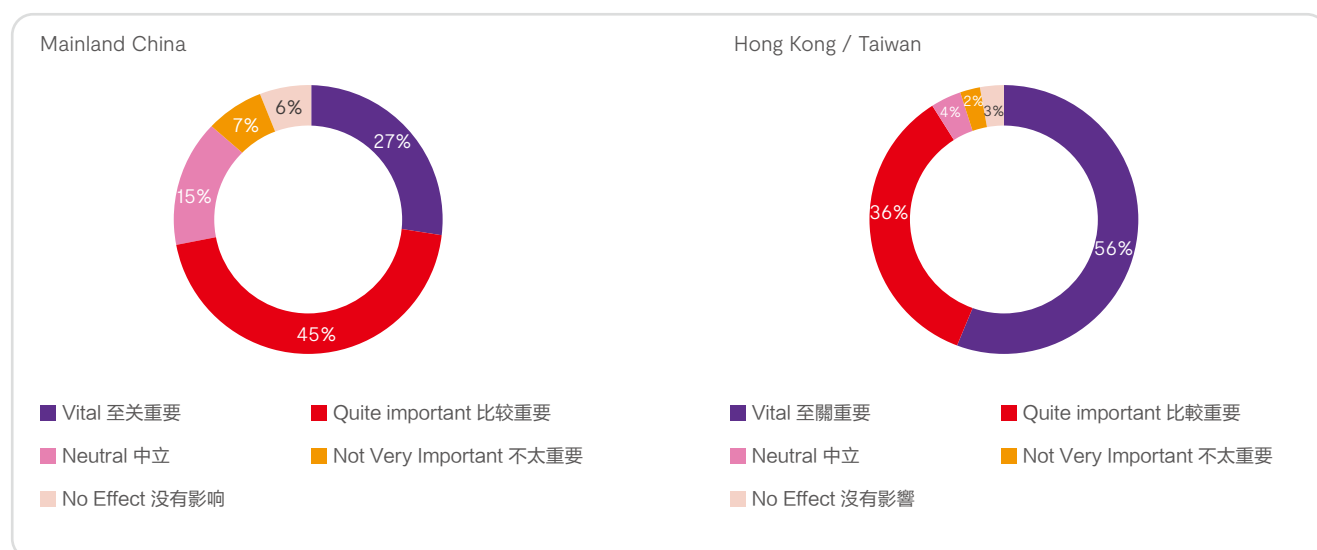
There is positivity about the impact on numbers who will head overseas. Given the reduction in tutoring there is strong sentiment that families will invest in language education to counter the lack of in country options for study. There is an expectation that students will go overseas at a younger age, which may impact undergraduate numbers. For international / independent schools we see an opportunity to grow numbers from China – albeit not all counsellors are familiar with the market yet – something we are committed to help change.

## Section 3

**Main Drivers of 2022 success. How important will the following factors be in determining success for institutions in 2022?**

**2022年影响大学发展的重要因素?**

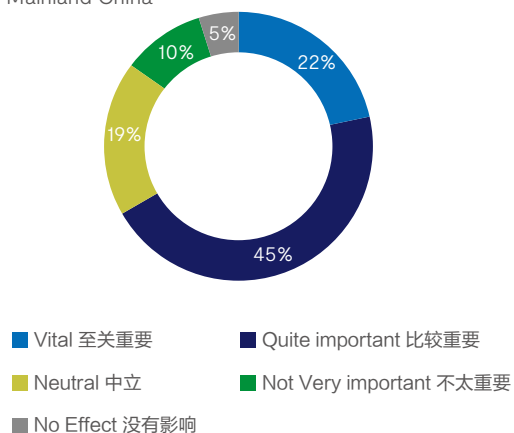
**第8题 Face to face teaching on campus as the main delivery method?**  
以面对面教学为主要授课方式会影响2022年留学情况?



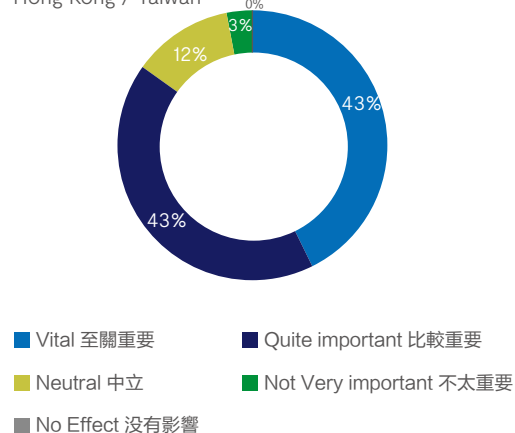
### 第9题 Flexibility re allowing students to start (or spend some time) online?

学生能否在线学习会影响2022年留学情况?

Mainland China



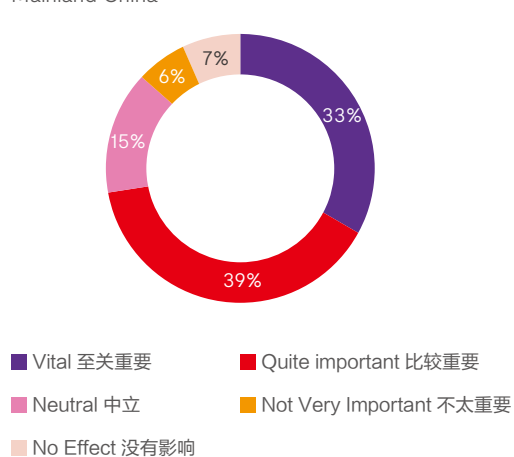
Hong Kong / Taiwan



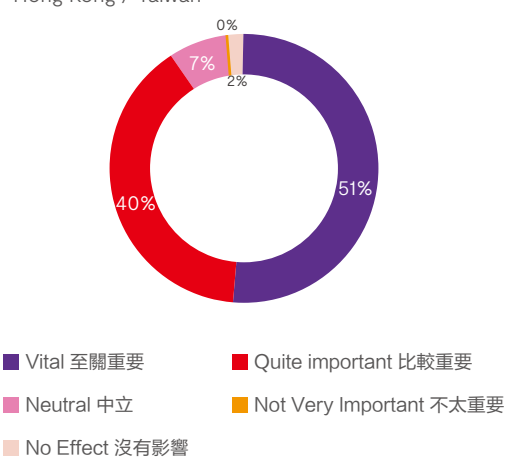
### 第10题 Visible, enforced COVID-19 safety policies?

实行大众可见的疫情防控措施会影响2022年留学情况?

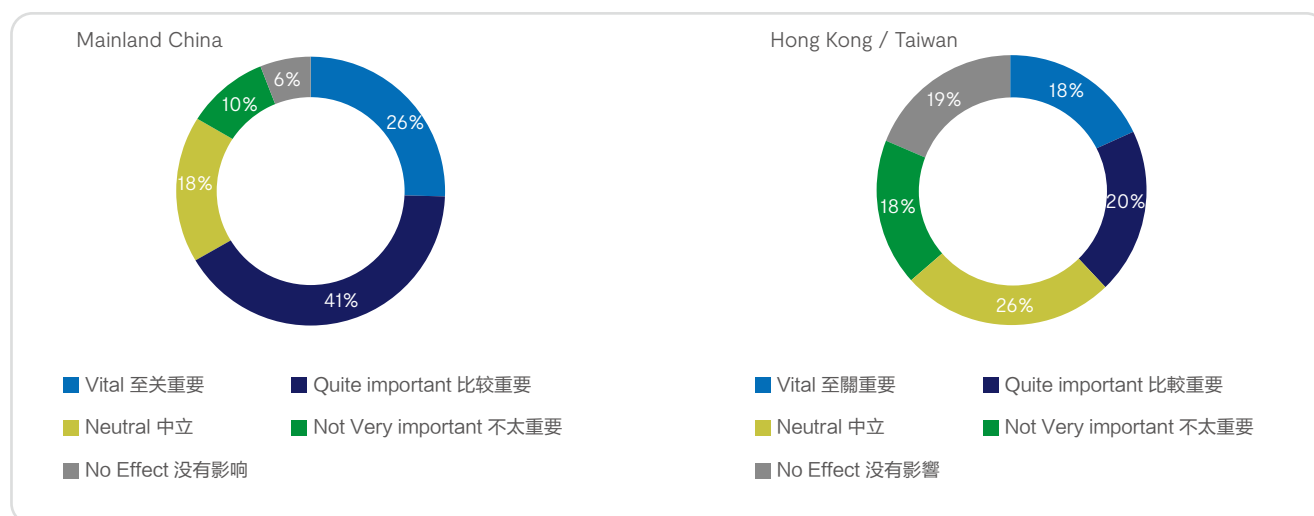
Mainland China



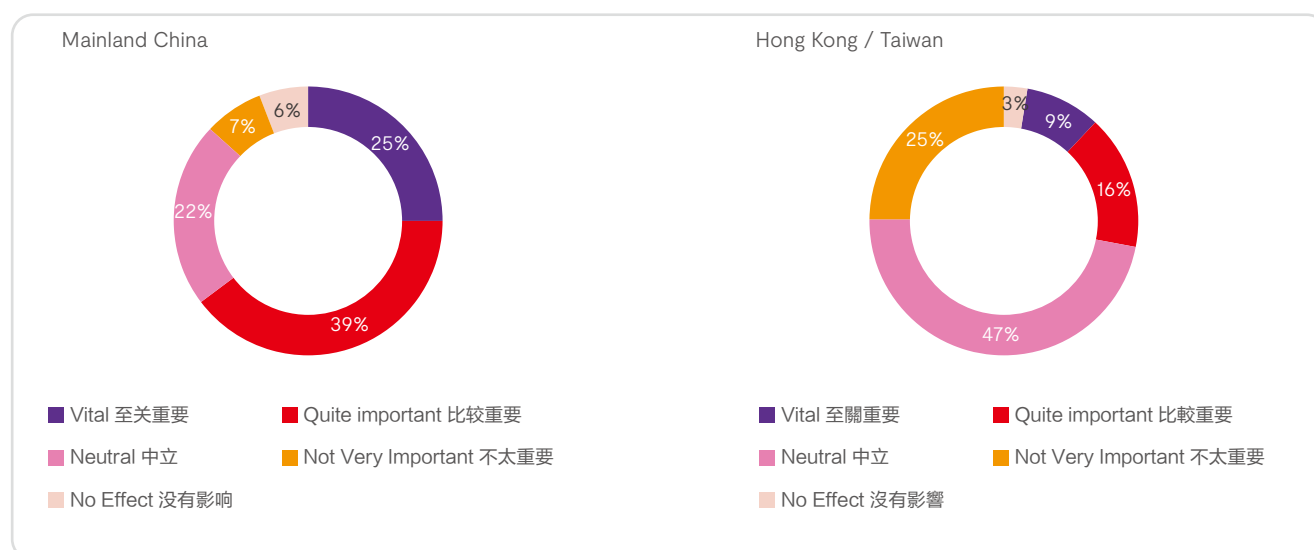
Hong Kong / Taiwan



**第11题 In person F2F institutional staffing of student recruitment events in market?**  
大学校方进行线下招生活动的必要性?



**第12题 F2F teaching operations for overseas institutions in market?**  
海外大学在中国进行面授课程的重要性?



We see the key here as being that a return to 'normal' (the practices of 2019) should not mean that the flexibility adopted during the pandemic be removed. Equally students and families will want to feel safe. While the survey pre-dates Omicron keeping campuses visibly safe and communicating to the market about this seems vital. Presence in market at recruitment events, as the markets themselves ease restrictions, will be important. Consideration needs to be given to how institutions will service this. We perceive there still to be strong demand for teaching / programme presence in mainland China but this is not seen as much of a priority in Hong Kong and Taiwan at this stage.

## Section 4

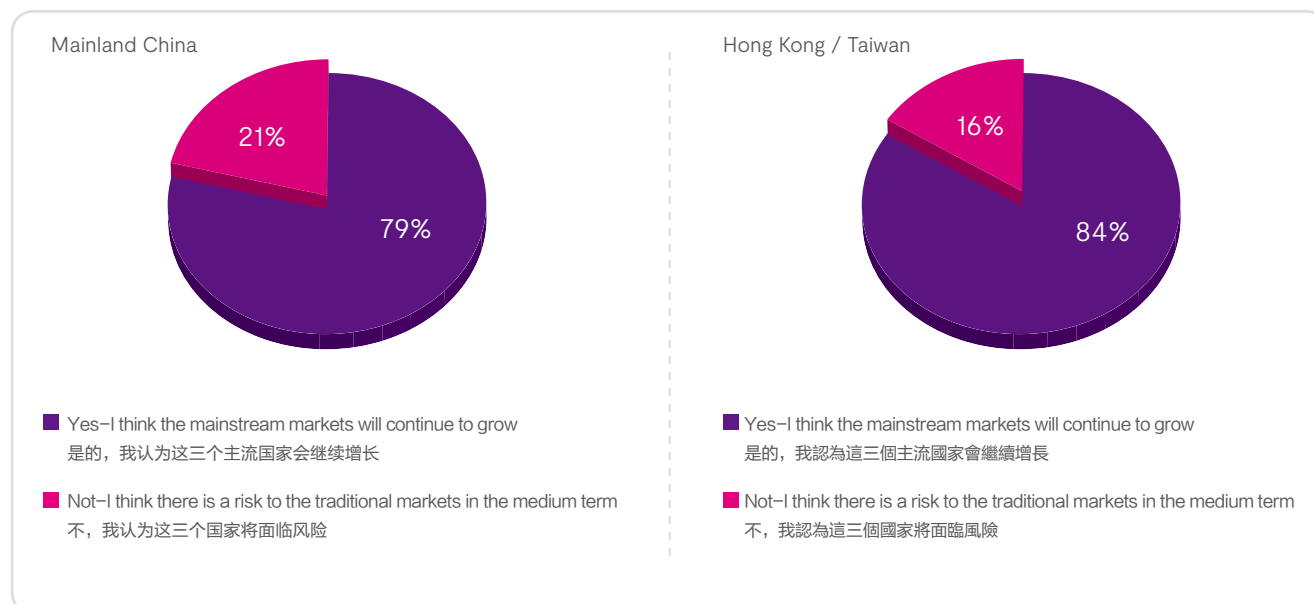
### Medium-term thoughts 中期的想法

In 2021 various changes has led many to comment that institutions in traditional markets will come under even greater threat from students staying locally or regionally. In this snapshot, it seems out network is less 'concerned' about this. It is also important to note the expectations from above re aspects of the pandemic response should be maintained. The thoughts below on what may be needed going forward.

#### 第13题

**With the various changes in domestic policy, international relations and the rise rankings of universities in China and the wider Asia region, are you confident that the market for overseas study in the UK, US and Australia will remain strong in the medium term?**

随着国内政策、国际关系的变化，以及中国和更广泛的亚洲地区大学排名的上升，您是否有信心英国、美国和澳大利亚的海外留学市场能够保持强势？



#### 第14题

**Please list some actions the UK, US and Australia (or institutions) need to take to remain competitive in the eyes of the students in your market?**

请列出英国、美国和澳大利亚等国家(或大学)需要采取的关键行动，以保持在学生中的竞争力？

We have summarised categories of feedback here as well as highlighting relevant examples of suggestions.

We received around 700 individual suggestions in this area with most coming in the following categories (listed by size)

- More proactive initiatives to support recruitment
- Positive visa support alongside immigration policies
- Flexibility (and simplicity) of entry and admission requirements
- Reasonable approach to price increases
- Maintenance of COVID prevention and control

Any individual uni needs to maintain it's world ranking position



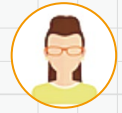
Would be good to provide internships

Respond to enquiries more efficiently



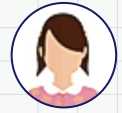
Help find jobs for students

Promote more actively through events in market



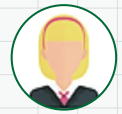
The speed of CAS issuance and visa support needs to improve

Visa acceptance rates need to get better for the USA



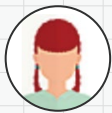
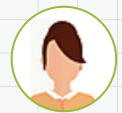
Chinese vaccines need to be approved

The Australian government needs to be co-operative and take a more neutral position on international issues



The UK should keep its position of accepting many different English tests

Some unis should realise their requirements actually let students get into much higher ranked places



Admissions policies need to be consistent and quick. Students don't want to wait months

Tuition fees should be kept flat



More scholarships need to be available – those smaller countries in Europe are attractive in this regard

Unis need to keep things safe as the news here shows us that the UK has a very different way to deal with things





While we have sourced students from our network in South-East Asia for a number of years, we are delighted to announce that in our Kuala Lumpur office is now operational and will be supporting (and expanding) our network through 2022. The prime location also offers our staff and partners as well as the institutions we work with a strategic base for staffing or work during your travels when they resume.

**Benny Toolseram**  
Regional Director (Southeast Asia)



“

This expansion comes with the appointments of Benny Toolseram as our Regional Director (Southeast Asia). Benny is a specialist with a decade of multifaceted experience in marketing, recruitment and business development in the region. His unique combination of culture given his Burmese, Chinese and Malaysian background and his ability conversing in multiple languages will accelerate the expansion of our Southeast Asia operations.

A strong believer in positive thinking with a big smile, Benny is always there to support. He enjoys exploring new technology, networking, great food and believes strongly in social responsibility.

# GEA Annual Conference

While very few partners were able to travel to China in 2021, it was with enormous happiness that we held our GEA Annual Conference from October 12<sup>th</sup> - 15<sup>th</sup> in Dalian featuring 530 colleagues from the GEA team, network partners and China based representatives. It was a great chance for the network to gather and celebrate success. As per all previous years the focus was also on institutions meeting recruitment agents and on professional development via sessions led by industry leading experts who joined us in the room and virtually. Thank you to all those who attended in person and online. We look forward to a bigger, better event in 2022 – hopefully with our international-based friends in attendance once more!



# Ride For The Children

In a challenging year like 2021, it can sometimes be difficult to remember the lucky and privileged position we are in. Since our foundation, at GEA we have been determined to give back. We do this via a sponsored bike ride with all contributions going toward the support of rural schools. This year, the ride saw 60 GEA and partner warriors take on the tough (but spectacular!) Qiandao Lake (千岛湖). While the number of students who access international education grows each year, we should never forget that for many thousands of students globally, just getting to a school is a challenge. With your support, many of these children are supported – and many more can continue to be going forward. Thank you for all you do and please be ready for you invite to next year's ride.



## About the Author **Neil Christie**



Neil Christie is the Managing Director, UK for Global Education Alliance, part of the Global Education Technology (GET) network and the Founding Director of TEN Education an allied organization working mainly in TNE and compliance.

Having spent his whole career in education sales and recruitment – other than a brief period as ‘Keeper of the Doves’ at the University of St Andrews – Neil is passionate about improving the experiences of, and services offered to international students. He believes that while technology is a key driver in the improvement of provision, understanding students needs and desires and that of their families, will should always underpin any approach.

Neil notes, “I met my first recruitment agent in China in 1998. What struck me recently and throughout the pandemic was how little the approach of some universities and agents had changed over time. Insight was often something that was up to institutions to figure out. At the same time agents were left to create marketing messages for China and South East Asia based on adapting material aimed at UK students.

I have known the GEA team for years. They are committed to constantly improving and adapting services to institutions and students. With the survey, we hope to help our partners understand what’s happening at a time when they may have no staff, or only one or two staff in market.

We’re all eagerly awaiting the chance to meet up in person with our partners again and until then, as we say at GEA – We Navigate!”

### Co-authors

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**Designed by:**

Lily Chen



The information contained in this report is correct at the time of publication, however, GEA reserves the right to alter, amend or declare details at any time without notice.

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